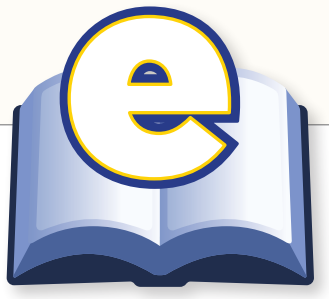

eText PROJECT MANAGEMENT USER MANUAL

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Overview

BACKGROUND

Pearson offers several types of eBooks, all of which effectively convey the content of a printed book. eBooks are created for platforms and resellers like CourseSmart, Amazon Kindle, Barnes & Noble NookStudy, etc. Some eBooks are offered in a reflowable format, such as ePub (electronic Publication), which can be read on Amazon's Kindle device. Other eBook formats maintain fidelity to the original printed page; this category of eBook includes CourseSmart, uPDF (Universal PDF), and the Pearson eText platform.

The eText is a Web-based platform developed and owned by Pearson. In addition to displaying a visual representation of the book pages, the eText format allows us to provide some custom navigation options, and give users the ability to highlight and take notes on the content. In addition, there is an instructor view that allows instructors to make notes and share them with their students. The eText also offers multiple integration scenarios for final delivery. As such, it is a platform that is constantly evolving to produce efficiencies within Pearson and meet our customers' needs.

More Info

To learn more about the eText, refer to the **eText Interface Quick Reference Guide**, *and the eText videos:* **Introduction to eText**, **eText Search Feature**, **eText Whiteboard View**.

PURPOSE

The eText Project Management User Manual is intended to be used for eText titles that are NOT part of the Integrated Workflow. It walks you through the production procedures for an eText title from beginning to end.

RESULT

An eText title is published through one or more integration scenarios.

CONDITION

Vendor training for eText ingestion processing and use of the eText applications, such as the Content Manager and the eText Authoring environment, are not covered/supported by this manual and should occur prior to the processes detailed in this manual.

1 | Launch Parent Product and eText Project

Launch Parent Product

During the parent product launch meeting, the acquisitions editor confirms all required eBook formats. This meeting is the first opportunity to discuss any specific plans for the eText.

Launch eText Project

The goal of the eText launch is to gather essential information about how the eText will be linked to/from its associated courses/websites (e.g., MyLabs), when the eText needs to go live, and what types of custom hotspots (i.e., media links) or custom baskets are desired. This information is then recorded on the **eText Launch Checklist**.

Role

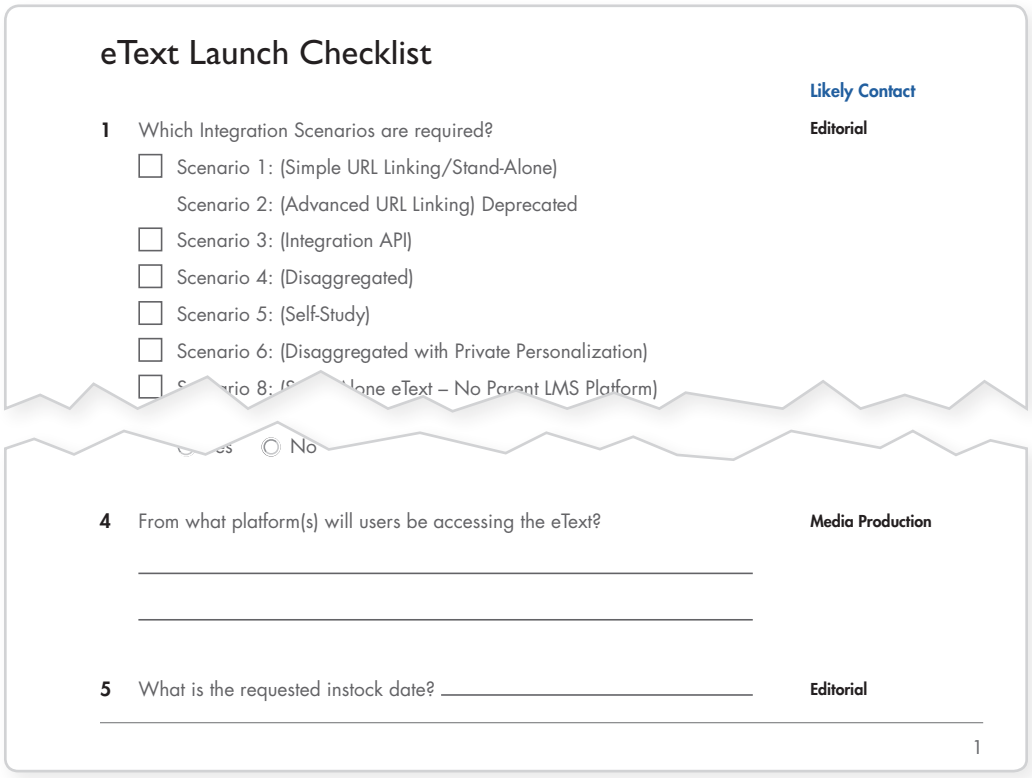
These steps are performed by the **Pearson Project Manager**.

1 Launch the eText by holding a virtual launch via email or a live meeting.

NOTES

- The eText launch should happen at least two months in advance of main text files to printer. The amount of lead time for the eText launch will depend on business unit protocols and the needs of the particular project.
- Roles to include in the eText Launch might be: the Full Service Vendor (FSV) Project Manager; the Pearson Project Manager; and Media contact(s) within Pearson (such as team members from Media Production, Media Editorial, and/or the Mastering group).
- Although it is feasible to create a demo or sample eText using a subset of book chapters, this can only be done using the PDF workflow. If the full, final eText is created using the XML workflow, it must be produced from scratch; the demo eText cannot be repurposed.

2 With information gleaned from the eText launch, complete the **eText Launch Checklist**. The checklist is a PDF form that contains check boxes and text boxes.



eText Launch Checklist

Likely Contact

1 Which Integration Scenarios are required? — Editorial

- ☐ Scenario 1: (Simple URL Linking/Stand-Alone)
- Scenario 2: (Advanced URL Linking) Deprecated
- ☐ Scenario 3: (Integration API)
- ☐ Scenario 4: (Disaggregated)
- ☐ Scenario 5: (Self-Study)
- ☐ Scenario 6: (Disaggregated with Private Personalization)
- ☐ S…rio 8: (S… …lone eText – No Parent LMS Platform)

… ◯ No

4 From what platform(s) will users be accessing the eText? — Media Production

_____

_____

5 What is the requested instock date? _____ — Editorial

1

More Info

Refer to the **eText Launch Checklist Guide** *for information about completing the checklist.*

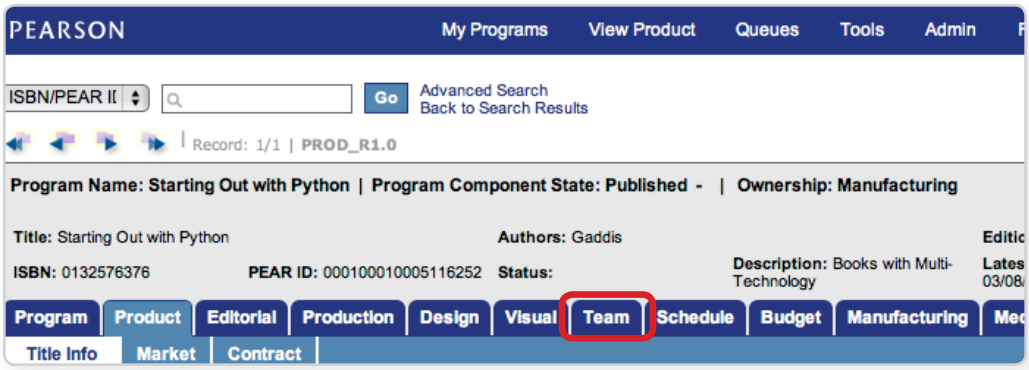
3 Click the 💾 button to save the completed **eText Launch Checklist** to your computer in PDF format.

Maintain the PCS eText Record

Upon completion of the **eText Launch Checklist**, you perform several tasks related, directly or indirectly, to PCS eText record maintenance.

Team

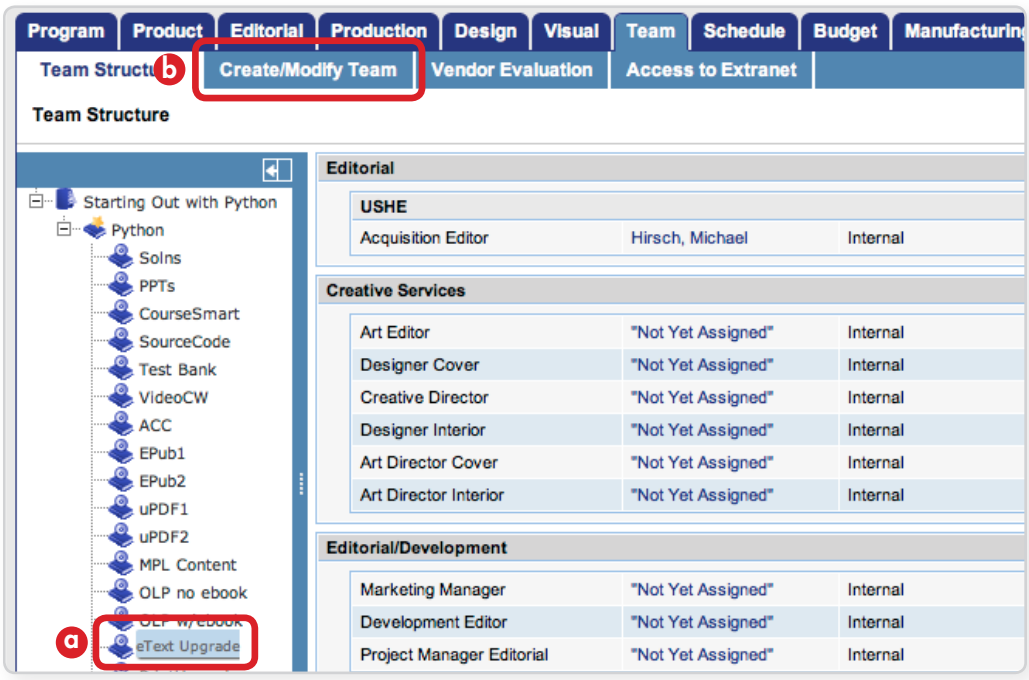
1 Log in to PCS, locate your program, and then click the **Team** tab.



2 The **Team Structure** screen displays.

a Click the **eText Upgrade** component in the program tree.

b Click the **Create/Modify Team** sub-tab.



Role

These steps are performed by the **Pearson Project Manager**.

Note

To log in to PCS, go to: http://pcs.pearson.com/pims.

Quick Tip

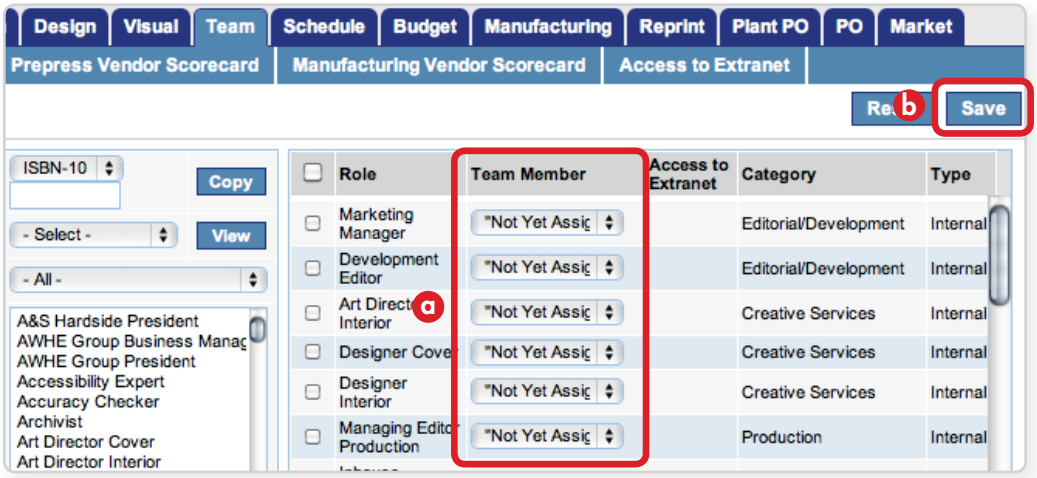
To access a program, click **My Programs** or run a search.

Quick Tip

Click the ⊞ icon to expand the program tree.

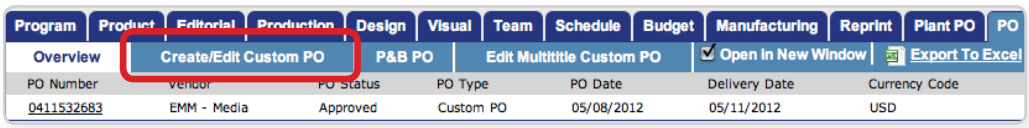
3 **a** Select names from the **Team Member** options next to the appropriate roles to create the eText team.

b Click the **Save** button.



PO

1 Click the **PO** tab, and then select the **Create/Edit Custom PO** sub-tab.

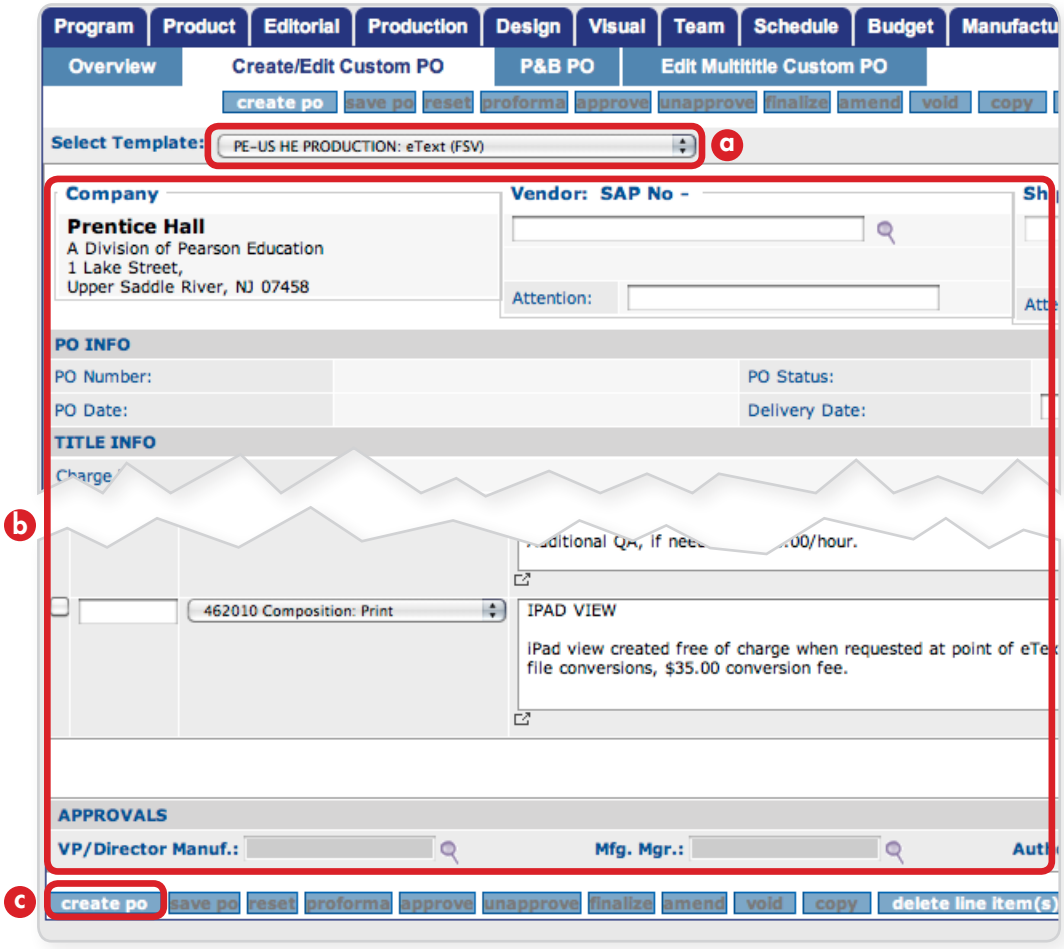


2 The **Create/Edit Custom PO** screen appears.

a Select **PE-US HE PRODUCTION: eText (FSV)** from the **Select Template** drop-down menu.

b Populate the custom PO form.

c Click the create po button.

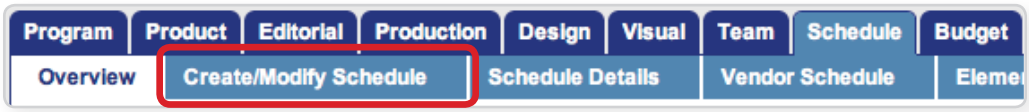


More Info

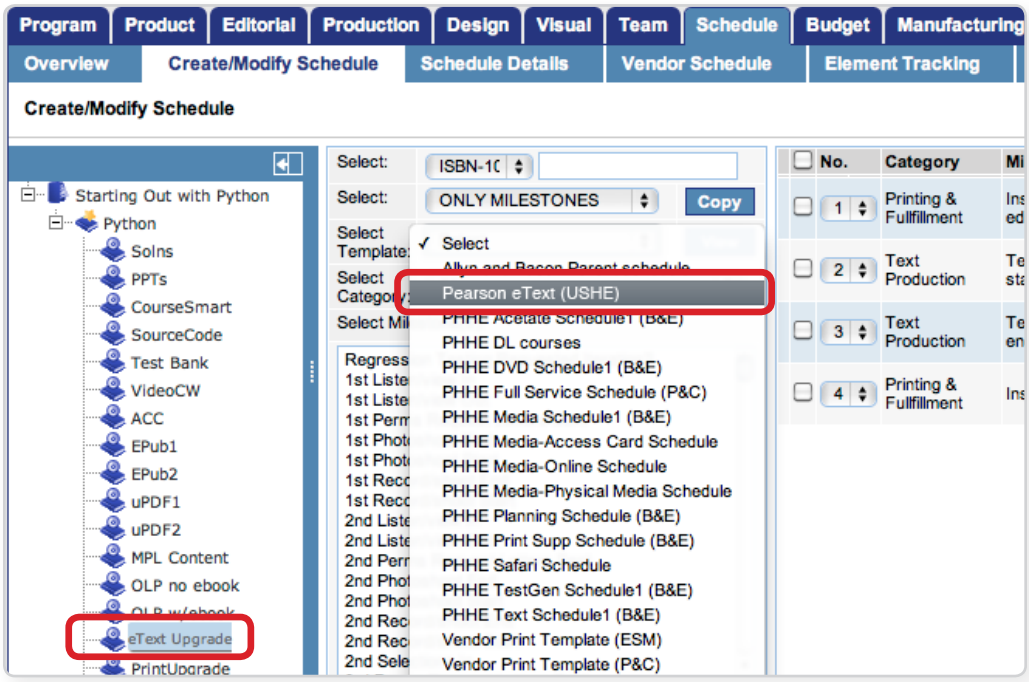
Refer to the PE-NA Prepress Module #9 available on the Pearson Knowledge Base for eText pricing guidelines.

Schedule

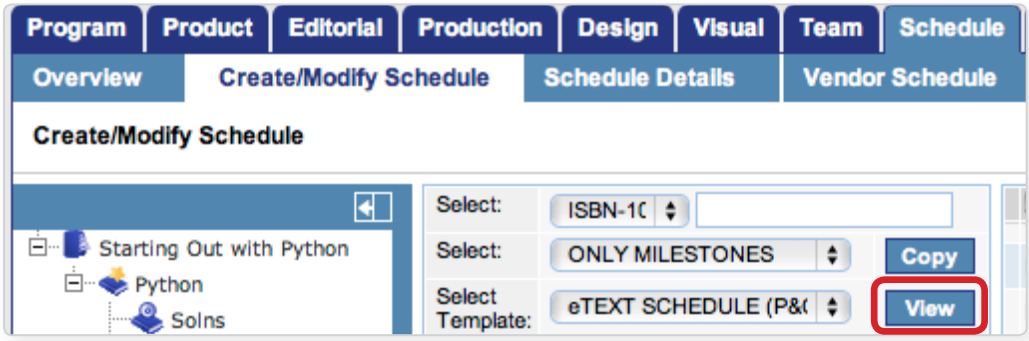
1 Click the **Schedule** tab, and then select the **Create/Modify Schedule** sub-tab.



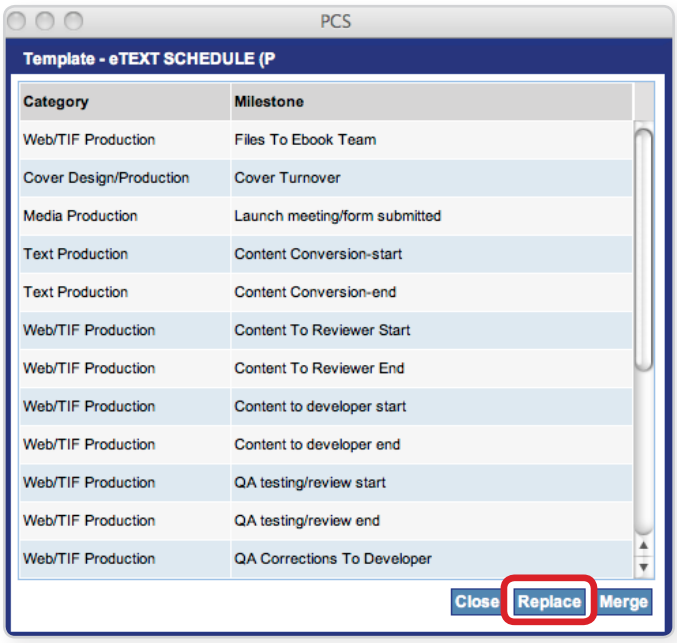
2 The **Create/Modify Schedule** screen appears. Ensure that **eText Upgrade** is selected in the program tree (nomenclature for eText upgrade ISBN varies by business unit). Click the **Select Template** drop-down menu, and then select Pearson eText (USHE).



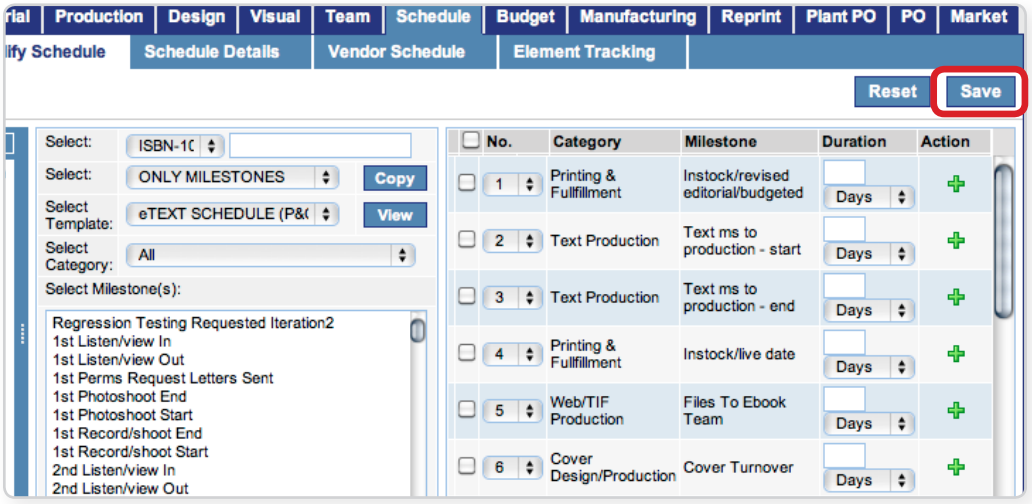
3 Click the **View** button.



4 The **Template** dialog box appears. Click the **Replace** button.



5 Make any additional updates, and then click the **Save** button.



More Info

For training on the PCS **Schedule** *tab refer to the* Create and/or Revise Editorial Production Schedule *job aid.*

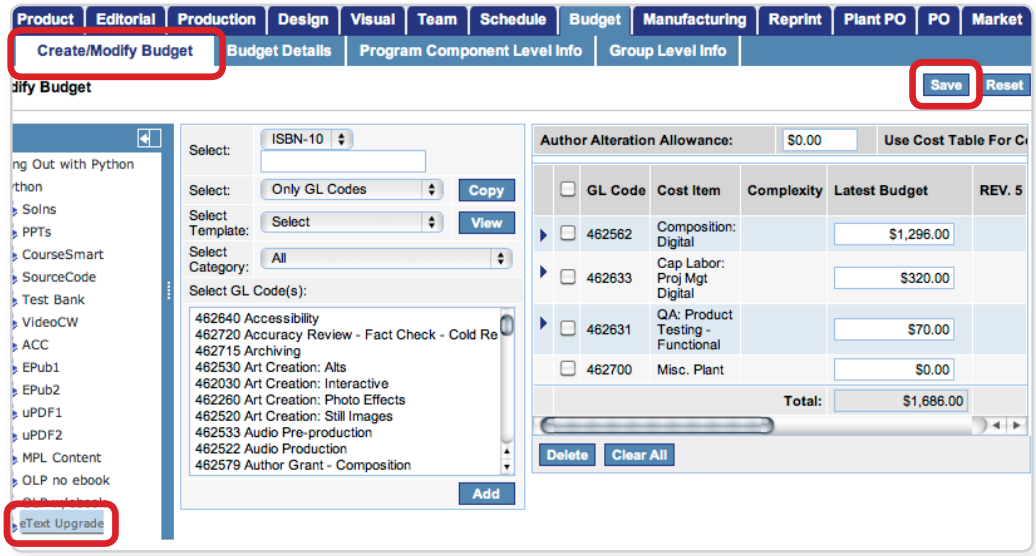
More Info

To see an overview of eText milestones and turnaround times, refer to the eText process/ schedule overview *document on Neo.*

Budget

1 Click the **Budget** tab, and then select the **Create/Modify Budget** sub-tab.

2 The **Create/Modify Budget** screen appears. Ensure that **eText Upgrade** is selected in the program tree. Enter the estimated eText budget, and then click the **Save** button.



3 Check with the Full Service Vendor (FSV) to confirm that s/he has access to PCS for the purposes of updating the **Schedule** tab.

NOTE If the FSV does not have access to PCS, submit a TPS request. If the FSV does not have a V42 account, s/he will first need to be onboarded. Refer to the Pearson Systems & Application Access flowchart for more information.

Quick Tip

Enter the estimated budget based on the FSV's purchase order, plus any additional costs not applicable to the FSV, such as EMM time.

More Info

For training on the PCS **Budget** *tab refer to the* Create and/or Revise Detailed Budget per Program Component *job aid.*

Initiate Project with Vendor

After updating the eText Upgrade record in PCS, initiate the eText project with the **Full Service Vendor**.

1 Within your email client, create a new mail message to the FSV and attach the PO and the completed eText Launch Checklist. Also include the contact information for all members of the Pearson project team.

Role

This step is performed by the **Pearson Project Manager**.

2 Examine the contents of the Project Initiation email and determine the eText workflow.

Role

These steps are performed by the **FSV**.

> **NOTE** Most titles are composed with XML tagging and therefore will follow the XML workflow. If no XML exists, the eText will follow the PDF-only workflow.

3 Draft a production schedule and email it to the Pearson Project Manager.

4 Review the production schedule and either approve or provide revision instructions via email.

Role

This step is performed by the **Pearson Project Manager**.

5 Once the production schedule is approved, contact all eText project team members via email to inform them that the project is underway.

Role

This step is performed by either the **Pearson Project Manager** or the **FSV**, depending on business protocols.

> **NOTE** This communication should ideally include the Pearson project manager, FSV project manager, Media contact(s), and the acquisitions editor.

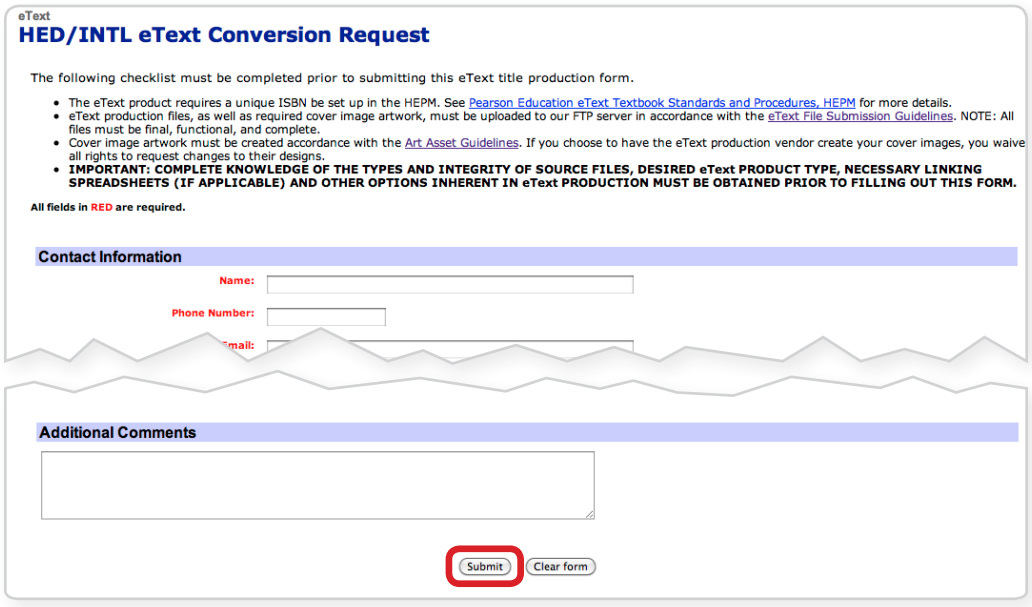
2 | Convert Files

Request Conversion

Once the project has been initiated with the vendor, the eText File Conversion Request form can be submitted which will trigger the eText production process to begin.

1 Launch your browser, and then navigate to the **eText Conversion Request** form: http://etextdb.pearsoncmg.com/etextdb/eTextConversionRequestHE.

2 The **HED/INTL eText Conversion Request** form displays. Complete the form, and then click the Submit button.


eText
HED/INTL eText Conversion Request
The following checklist must be completed prior to submitting this eText title production form.
The eText product requires a unique ISBN be set up in the HEPM. See Pearson Education eText Textbook Standards and Procedures, HEPM for more details.
eText production files, as well as required cover image artwork, must be uploaded to our FTP server in accordance with the eText File Submission Guidelines. NOTE: All files must be final, functional, and complete.
Cover image artwork must be created accordance with the Art Asset Guidelines. If you choose to have the eText production vendor create your cover images, you waive all rights to request changes to their designs.
IMPORTANT: COMPLETE KNOWLEDGE OF THE TYPES AND INTEGRITY OF SOURCE FILES, DESIRED eText PRODUCT TYPE, NECESSARY LINKING SPREADSHEETS (IF APPLICABLE) AND OTHER OPTIONS INHERENT IN eText PRODUCTION MUST BE OBTAINED PRIOR TO FILLING OUT THIS FORM.
All fields in RED are required.
Contact Information
Name:
Phone Number:
Additional Comments
Submit
Clear form

Role

These steps are performed by the full service vendors (**FSV**).

Note

Data from this form automatically feeds into a CMS database, which allows CMS to track each eText project that enters the authoring environment.

Quick Tip

Required fields are in **red**.

More Info

The **Request eText Conversion Job Aid** *is coming soon and will contain instructions on how to complete the eText Conversion Request form. For now, download a* **Sample eText Conversion Automated Response** *to view a completed form.*

3 A confirmation email, containing the online eText conversion request, arrives in your email client inbox.

NOTE Confirmation emails are sent to all valid email addresses included in the Conversion request form address fields. If you do not receive an email within 30 minutes of submitting a conversion request, contact eBookPlusProduction@pearson.com. Do not submit another form as this may create a duplicate record in the eText Production Database.

eText XML Creation, File Upload, and Ingestion

Role

These steps are performed by the **FSV**.

Upon completion of the **eText File Conversion Request** form, you can begin the process of generating the XML, uploading all the required files to the Content Manager FTP server, and ingesting these files using the Content Manager.

NOTE See the eText Production Manual for a detailed outline of these steps. If you need training in this process, please email a request to eBookPlusProduction@pearson.com.

3 | Prepare for Custom Linking

Populate Custom Spreadsheets

Any hotspots that are not automatically generated through ingestion of XML must be specified on a custom hotspot spreadsheet. The spreadsheet contains information for each individual link you want added to the eText. When XML is used, this can be a fairly small list of additions, because the XML provides the majority of the links automatically. When there is no XML, the spreadsheets can be lengthy, depending on how many and what types of links you want to add. Ultimately, using XML output whenever possible is the most efficient approach to the linking stage.

NOTES Completion of the custom spreadsheets can be time-consuming and labor-intensive; therefore two workflows exist for handling this task. The **eText Launch Checklist** indicates which workflow to follow:

- **FSV Workflow**: The FSV populates the spreadsheet, using a media correlation grid provided by the Pearson Media contact.
- **Pearson Media Workflow**: The Pearson Media contact populates the custom spreadsheet.

Quick Tip

A *hotspot* is a clickable area on the page (either over a word, image, or media icon), that links to a variety of content, such as: a glossary definition, cross-reference on another eText page, static image, audio file, document, other media asset, or non-Pearson website.

FSV Workflow

1 Provide a media correlation grid to the **FSV**.

NOTE The media correlation grid must contain the following: location of each custom hotspot in the book; location of media icon the hotspot should link to (if applicable); valid URLs; and indicate if the hotspot should appear in the iPad view (if applicable).

Role

These steps are performed by the **Pearson Media** contact.

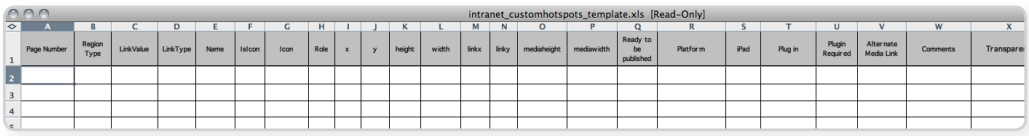
2 Provide all custom media icons (if applicable) in the correct format to the **FSV**.

NOTE Media icons must be in SWF format for the Flash view (online eText), and in PNG format for the iPad view.

More Info

Refer to the eText Art Asset Guidelines *for more details.*

3 Using the materials provided by the Pearson Media contact, populate the custom hotspot spreadsheet.



Role

These steps are performed by the **FSV**.

NOTES Refer to the following templates and guidelines to help you start and complete the custom spreadsheet:

- Guidelines for Preparing the Custom Hotspots Spreadsheet (These instructions explain the format of the spreadsheet and what values should be entered in each column for each link.)
- Blank Spreadsheet Template (This is the blank template that you must populate using information from Pearson Media.)
- Sample Custom Hotspot Spreadsheet (This is an example of a completed custom hotspot spreadsheet.)

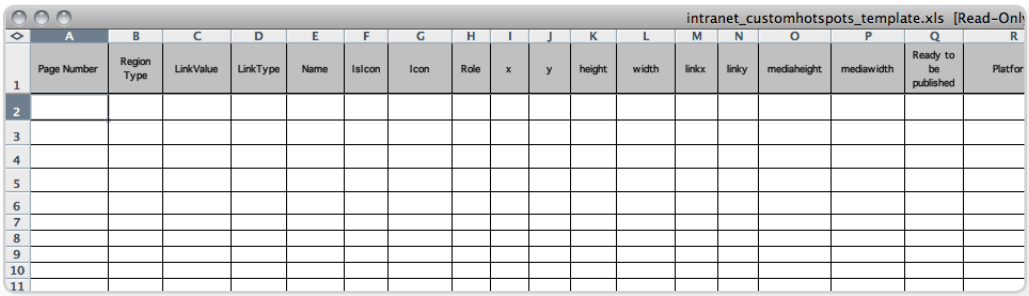
4 Upload the completed Custom hotspot spreadsheet to the Content Manager FTP Server.

Pearson Media Workflow

1 Populate the custom hotspot spreadsheet, according to established specifications.

Role

These steps are performed by the **Pearson Media** contact.



NOTES Refer to the following templates and guidelines to help you start and complete the custom spreadsheet:

- Guidelines for Preparing the Custom Hotspots Spreadsheet (These instructions explain the format of the spreadsheet and what values should be entered in each column for each link.)
- Blank Spreadsheet Template (This is the blank template that you must populate, according to established specifications.)
- Sample Custom Hotspot Spreadsheet (This is an example of a completed custom hotspot spreadsheet.)

2 Provide the completed hotspot spreadsheet to the FSV.

3 Upload the completed custom hotspot spreadsheet to the Content Manager FTP Server.

Role

This step is performed by the **FSV**.

4 | Set Up SMS

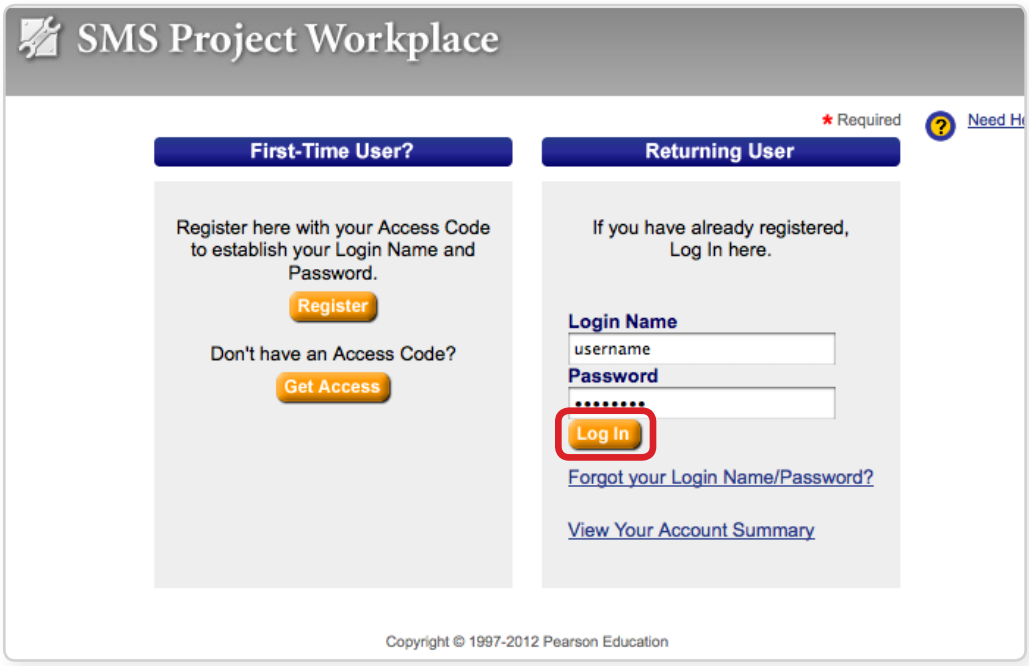
If any back-end SMS required for the eText has not yet been set up, it will need to be set up in SMS Project Workplace.

Role

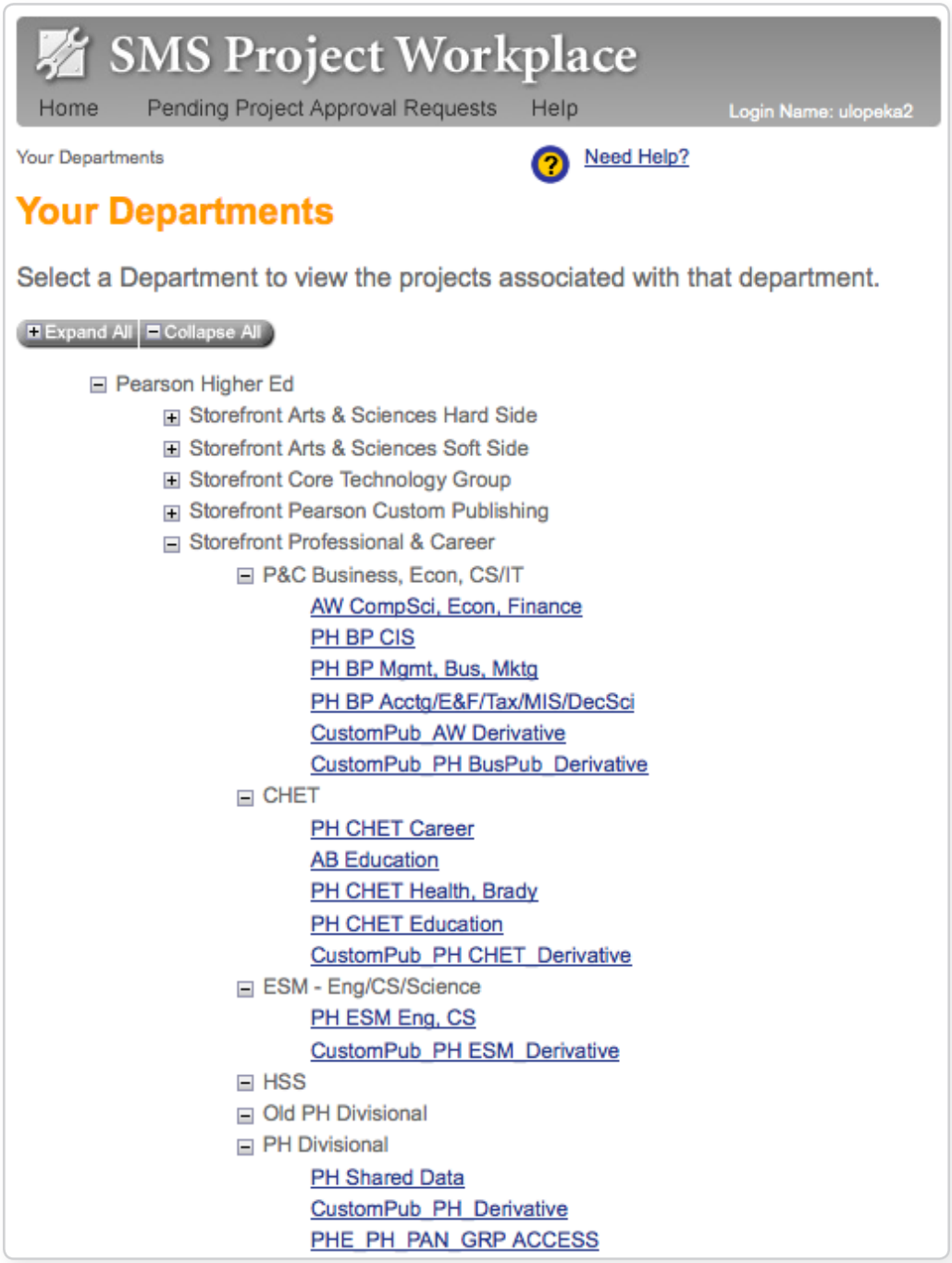
These steps are usually performed by the **Pearson Media** contact, however, the role may vary depending on business unit protocol.

1 Refer to the completed **eText Launch Checklist** to verify whether or not SMS has been set up. If not, launch your browser and navigate to SMS Project Workplace: https://sms.pearsoncmg.com/workplace/.

2 The **SMS Project Workplace Log In** screen displays. Type your credentials, and then click the Log In button.



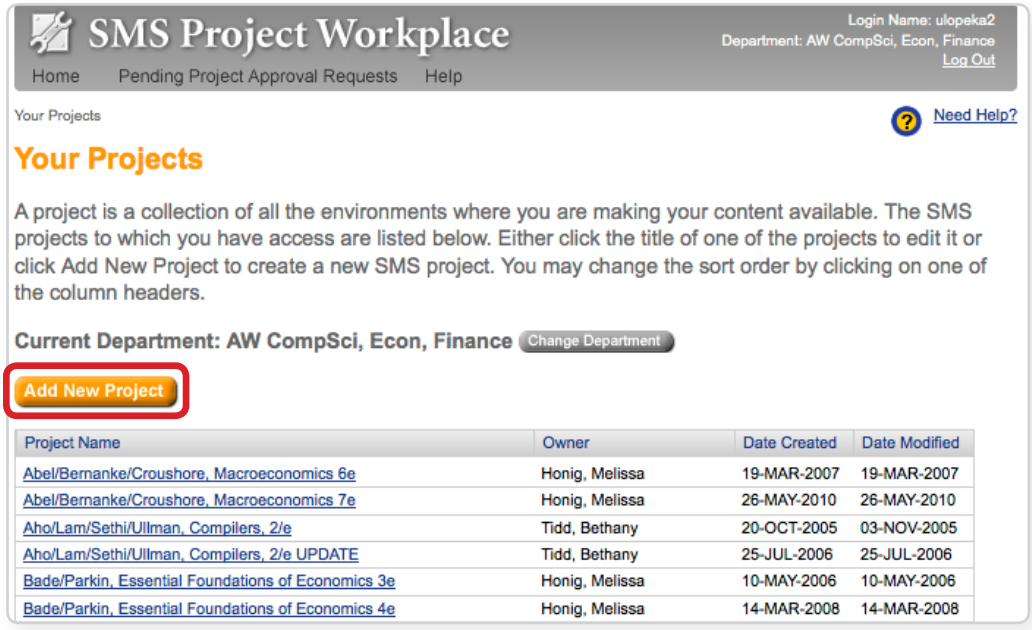
3 Depending on your access, you may be able to select from several different departments. Navigate to your department, and then select it.



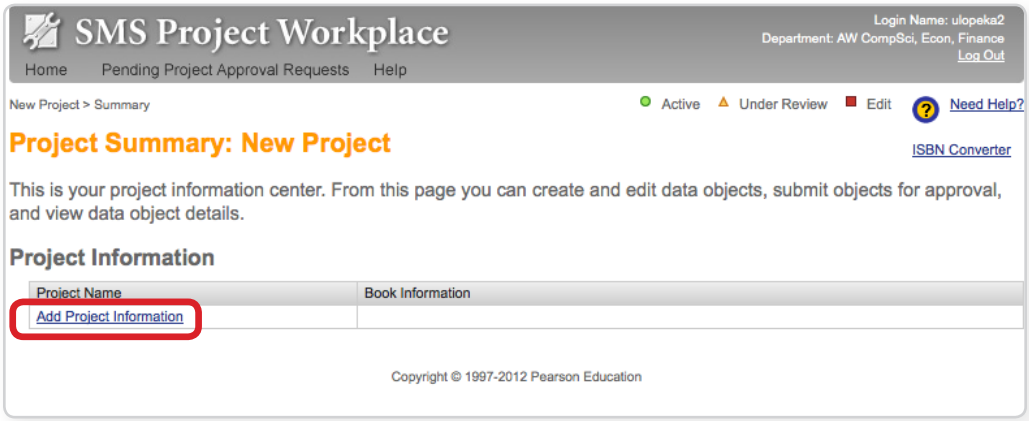
Quick Tip

Click the ⊞ icon to expand the departments.

4 A list of projects displays for your department. To set up SMS for a new project, click the **Add New Project** button.



5 The **Project Summary** screen displays for the new project. Click the **Add Project Information** link to add project information, and then set up SMS accordingly.



More Info

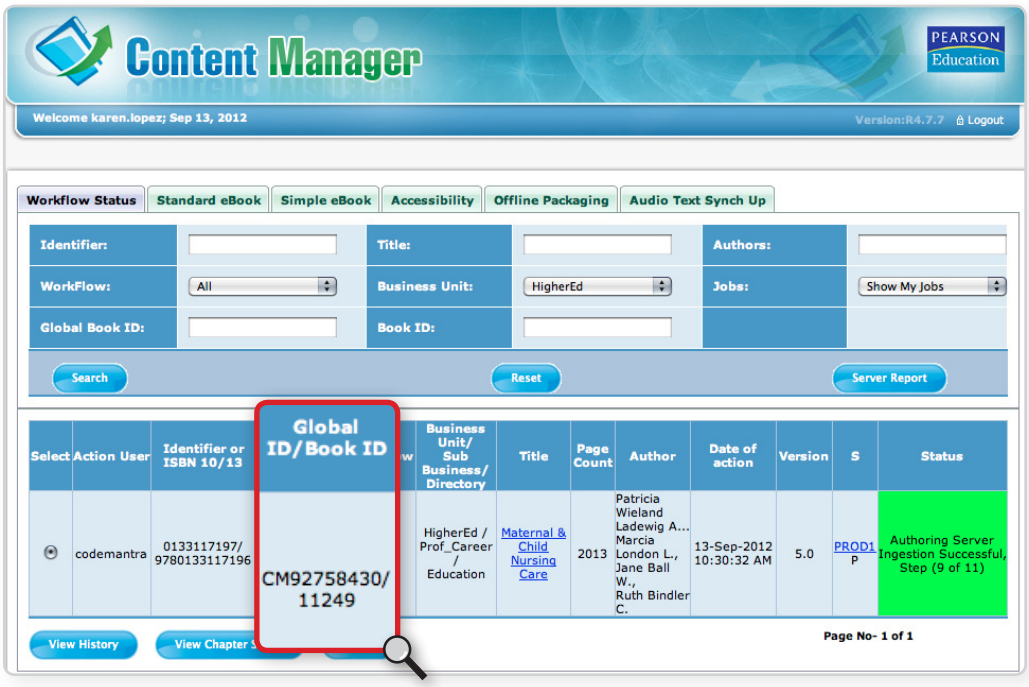
For detailed steps on setting up subscription products in SMS Project Workplace, click the Need Help? *link located in the upper right of any SMS Project Workplace screen.*

5 | Begin First Review

Supply Book ID and Global Book ID

During initial ingestion processing, the Content Manager generates an alphanumeric Global Book ID, and when book files are uploaded to the authoring environment, a numeric Book ID is generated to identify the eText. The numeric Book ID is essential to linking the eText with its associated courses/modes of access and must be supplied to the appropriate contacts.

1 After uploading book files to the Authoring server, locate the **Global Book ID / Book ID** under the **Workflow Status** tab of the **Content Manager**, and then email the IDs to the Pearson Project Manager and the Pearson Media contact. No Book ID will be displayed in the Content Manager's Workflow Status tab until the eText has been uploaded to the Authoring server.



Role

This step is performed by the **Full Service Vendor (FSV)**.

Note

Training on ingesting book files, which includes Content Manager training, is separate from this manual. If you need training, please email a request to eBookPlusProduction@pearson.com.

2 If a Mastering title is associated with the eText, forward the Book ID and Global Book ID to the Mastering Media Producer.

Role

This step is performed by the **Pearson Project Manager**.

Review eText

After IDs are supplied, you begin the first review of the eText. The primary purpose of the first review is to check the eText for page fidelity. This is done by comparing the eText pages to the final printer PDFs.

NOTE The first review applies to the Flash view of an eText (online eText) only. If the iPad view is enabled, there is no practical way to check pages in the iPad view, except on an iPad device after go-live. However, custom hotspots that are specific to the iPad view are QA'd later in the process.

Role

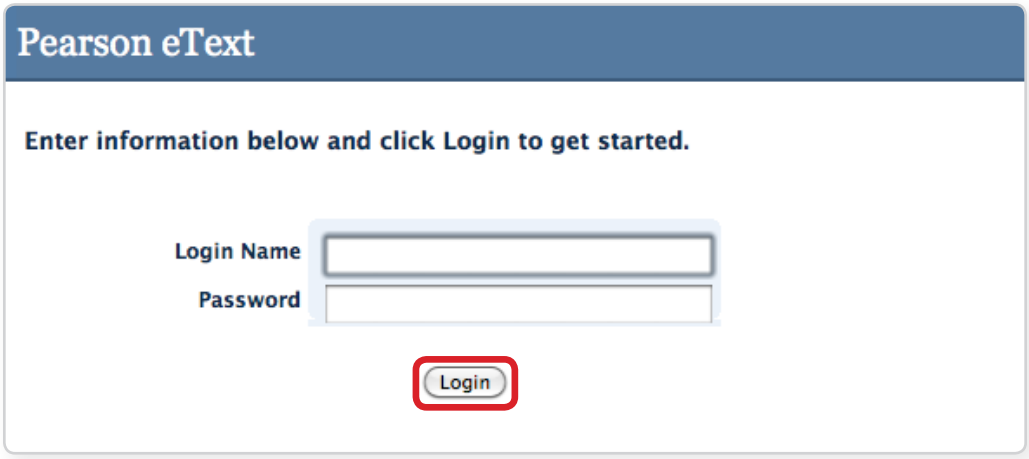
These steps are performed by the **FSV**.

1 On the Content Manager **Workflow Status** tab, locate your eText, and then click the **PROD1** link in the **S** column.

Note

Training on the Content Manager, is separate from this manual. If you need training, please email a request to eBookPlusProduction@pearson.com.

2 The **Pearson eText** login screen opens in a new browser window. Enter your login name and password, and then click the Login button.



3 A preview (Flash view) of the eText displays in the browser.

PEARSON
Welcome
Print | Help | Sign Out
Browse
My Searches
Search...
Go
Instructor View
Cover
63%
Maternal & Child Nursing Care
Table of Contents
Frontmatter
Part 1: Introduction to Family-Centered Care
Part 2: Women's Health
Part 3: Pregnancy and Family
Part 4: Birth and the Family
Part 5: The Postpartal Family and the Newborn
Part 6: Care and Needs Of children
Glossary
Index
Multimedia Resources
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THIRD EDITION
Marcia L. London • Patricia W. Ladewig • Jane W. Ball • Ruth C. Bindler • Kay J. Cowen
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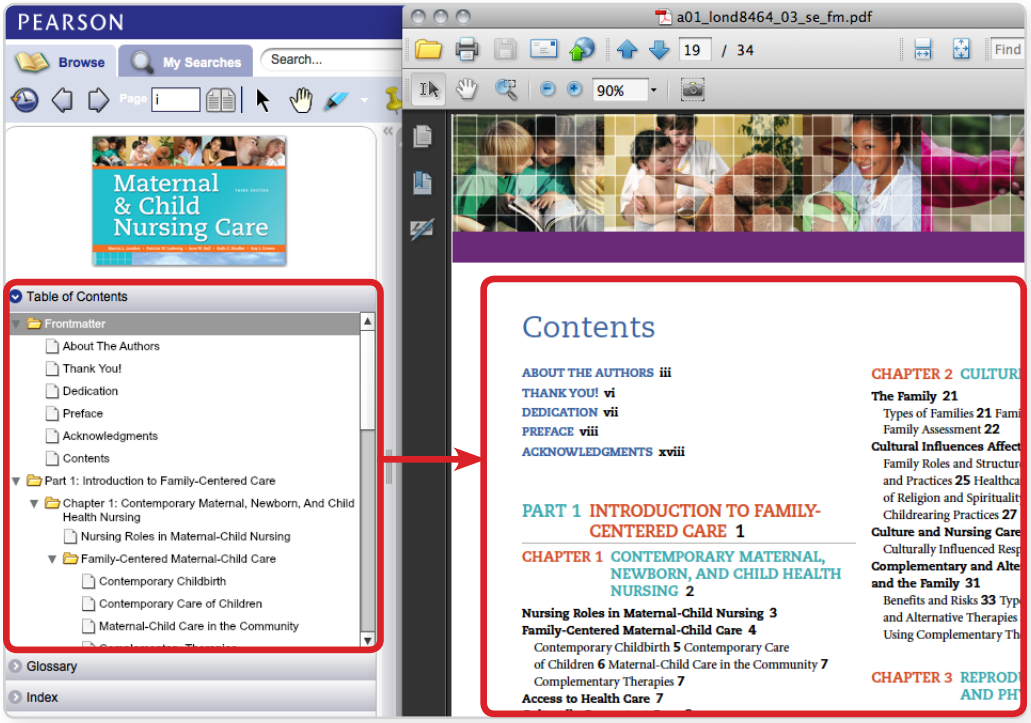
4 Open the final printer PDFs. With both the eText viewer and the printer PDFs open, navigate to the table of contents in the PDFs, and compare the contents to the eText **Table of Contents** basket in the left navigation pane. Check that the TOC titles, levels, and order match.



5 Compare page fidelity of the eText first and last chapter to the corresponding PDFs. Check the following:

- **a** Pagination (page numbering, order, missing, blank).
- **b** Verso/recto (left/right) pagination is correct.
- **c** Page ingestion success (images, artwork, special characters).

6 Review the entire eText to verify that non-permissioned items have been masked out with the text, *Item not available in eText*.

7 Review the entire eText for the presence of cross-references, key terms, and any other hotspots generated from XML.

NOTE The hotspot review at this point is only to check that hotspots generated from XML are present. This is not a check of individual hotspot accuracy.

Note

Final printer PDFs should include any corrections that were made on press.

6 | Begin First Corrections

If any errors are found during the first review, corrections must be made as necessary. Typical errors found at this stage include art rendering anomalies, incorrect recto-verso orientation, missing or blank pages, and missing hotspots due to problematic XML. Some of these types of errors (especially rendering errors) are often caused by faulty PDF construction.

Role

These steps are performed by the **Full Service Vendor (FSV)**.

1 Correct all errors found during first review.

> **NOTE** Depending on the error, you may need to manipulate the application files to generate new PDFs. Training on this process and reingesting files is not covered in this manual. Please refer to the eText Production Manual.

2 Once all errors are resolved, notify the Pearson Project Manager that the eText title is ready to proceed to the next stage.

7 Ingest Custom Hotspot Spreadsheet for Custom Linking

At this stage, the custom hotspot spreadsheet is ingested into the eText authoring environment for more efficient placement of custom hotspots.

Role

This step is performed by the **Full Service Vendor (FSV)**.

Quick Tip

Skip this step if your eText will not have custom hotspots.

1 Ingest the custom hotspot spreadsheet.

NOTE Training on the eText ingestion process is not covered in this manual. See the eText Production Manual for a detailed outline of these steps.

8 | Publish/Promote an eText Early (optional)

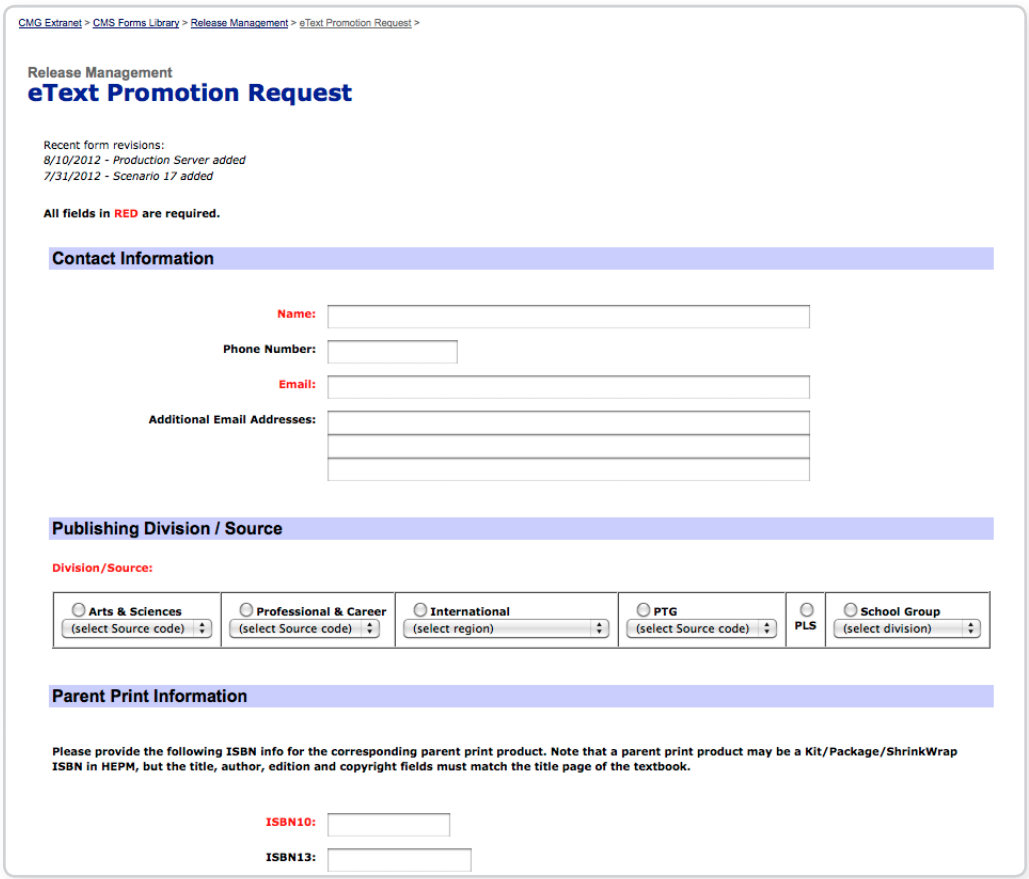
It may be necessary to publish (also called promote) the eText early for testing purposes. Publishing early enables Media and/or Mastering team members to test links from the associated course websites out to the eText and vice versa.

NOTE An eText Title with Scenario 1 (standalone eText) will be immediately visible on the instructor bookshelf upon promotion. Early promotion is unnecessary, and should be skipped, in cases where the eText is *only* offered as a standalone product.

Role

These steps are performed by the **Pearson Project Manager**.

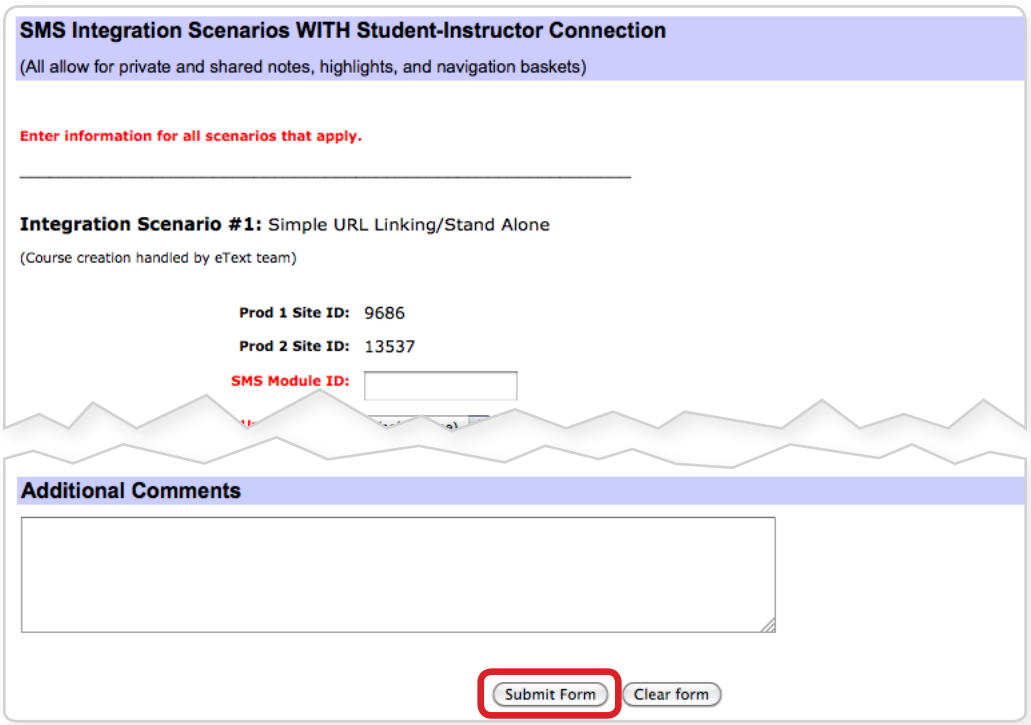
1 Launch your browser, and click the eText Promotion Request Form link.


CMG Extranet > CMS Forms Library > Release Management > eText Promotion Request >
Release Management
eText Promotion Request
Recent form revisions:
8/10/2012 - Production Server added
7/31/2012 - Scenario 17 added
All fields in RED are required.
Contact Information
Name:
Phone Number:
Email:
Additional Email Addresses:
Publishing Division / Source
Division/Source:
Arts & Sciences
(select Source code)
Professional & Career
(select Source code)
International
(select region)
PTG
(select Source code)
PLS
School Group
(select division)
Parent Print Information
Please provide the following ISBN info for the corresponding parent print product. Note that a parent print product may be a Kit/Package/ShrinkWrap ISBN in HEPM, but the title, author, edition and copyright fields must match the title page of the textbook.
ISBN10:
ISBN13:

Notes

- Early promotion is unnecessary to check content or links *within* the eText.
- The associated courses are *not* promoted along with the eText.
- Early promotion is *not* a "go-live" for customers, except in the case of Scenario 1 titles, as noted above.

2 Complete the form and specify all integration scenarios *except* the iPad scenario, if applicable, then click the Submit Form button.


SMS Integration Scenarios WITH Student-Instructor Connection
(All allow for private and shared notes, highlights, and navigation baskets)
Enter information for all scenarios that apply.
Integration Scenario #1: Simple URL Linking/Stand Alone
(Course creation handled by eText team)
Prod 1 Site ID: 9686
Prod 2 Site ID: 13537
SMS Module ID:
Additional Comments
Submit Form
Clear form

NOTE Do not specify the iPad scenario on the form because, if Mastering or MyLab courses are live and in use by customers, those customers will see the eText on their iPad bookshelf before eText production is complete.

3 Within three business days, you and other team members specified in the form will receive an email notification from Website Release that the eText has been published.

More Info

SMS Module IDs and other details required in the form can be found in the completed **eText Launch Checklist**.

Notes

- Be sure to include all email addresses of team members who will need to perform testing, in the **Additional Email Addresses** text boxes.
- Upon submitting the form, data is automatically passed on to Pearson's Website Release team.

9 | Perform Hotspot QA

At this stage, the accuracy of all hotspots within the eText is checked. If the eText has an iPad version, then custom hotspots must be checked in both the Flash (online) and iPad views. Typically, some hotspots will be available in both views, while others will only be available in the Flash view. Even if all custom hotspots apply to both the Flash and iPad views, each view needs to be checked separately to ensure that all custom hotspots are present.

There are two possible workflows for hotspot QA:

- Hotspot QA by the Full Service Vendor (preferred)
- Hotspot QA by Pearson Media QA Services.

Hotspot QA by Full Service Vendor

1 Launch your browser and navigate to the eText Flash (online) view.

PEARSON
Welcome
Print | Help | Sign Out
Browse
My Searches
Search...
Go
Instructor View
Cover
63%
Maternal & Child Nursing Care
Table of Contents
Frontmatter
Part 1: Introduction to Family-Centered Care
Part 2: Women's Health
Part 3: Pregnancy and Family
Part 4: Birth and the Family
Part 5: The Postpartal Family and the Newborn
Part 6: Care and Needs Of children
Glossary
Index
Multimedia Resources
Notes
Bookmarks
Maternal & Child Nursing Care
THIRD EDITION
Marcia L. London • Patricia W. Ladewig • Jane W. Ball • Ruth C. Bindler • Kay J. Cowen
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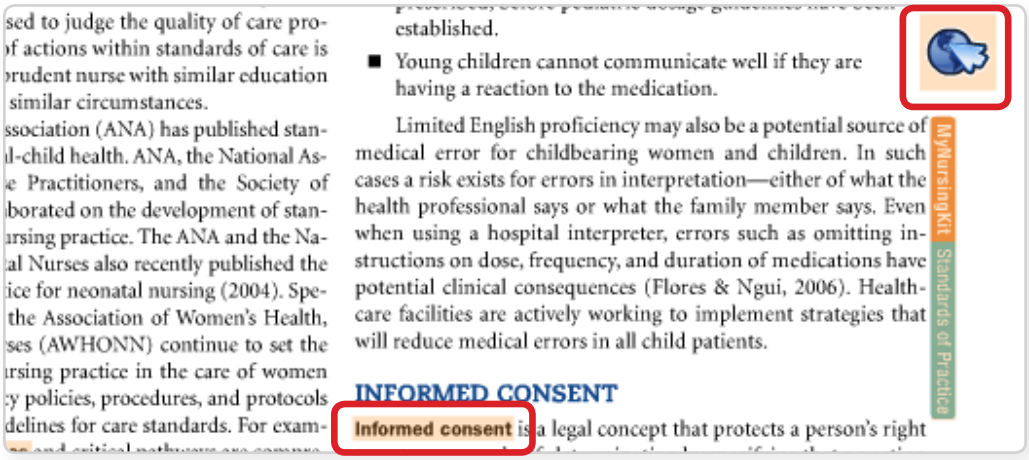
Role

These steps are performed by the **Full Service Vendor (FSV) QA Team**.

More Info

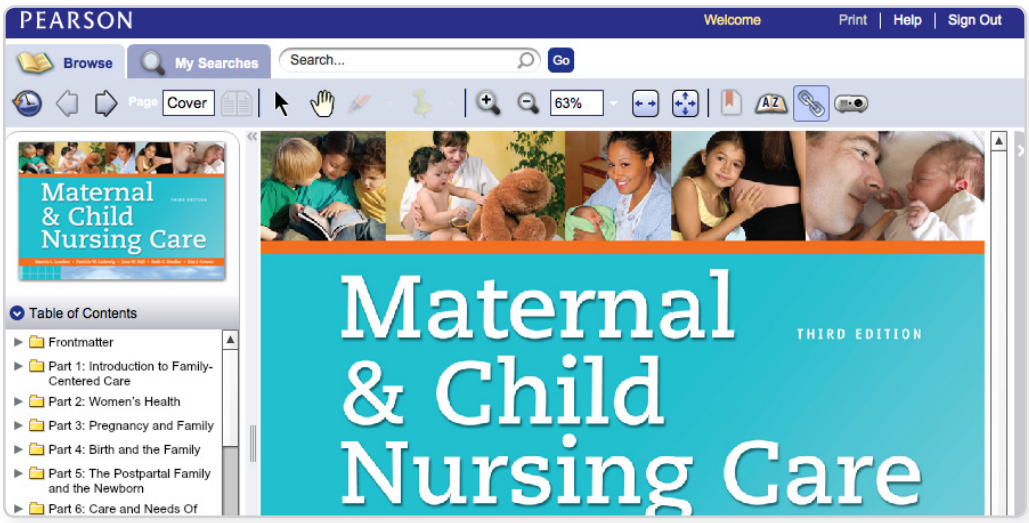
Refer to the Review eText section for details on how to access the eText Flash view. You can also access the eText Flash view via the eText authoring environment.

2 Click on all internal hotspots generated from XML, as well as all custom hotspots to check them. Make a note of any errors found.


established.
Young children cannot communicate well if they are having a reaction to the medication.
Limited English proficiency may also be a potential source of medical error for childbearing women and children. In such cases a risk exists for errors in interpretation—either of what the health professional says or what the family member says. Even when using a hospital interpreter, errors such as omitting instructions on dose, frequency, and duration of medications have potential clinical consequences (Flores & Ngui, 2006). Healthcare facilities are actively working to implement strategies that will reduce medical errors in all child patients.
INFORMED CONSENT
Informed consent is a legal concept that protects a person's right
MyNursingKit
Standards of Practice

NOTE Refer to the completed Custom Hotspot Spreadsheet(s) to confirm accuracy of custom hotspots.

3 If the eText has an iPad view, use the iPad preview to check hotspots. Launch your browser, and then launch the eText iPad preview.



4 Click on all custom hotspots only to check them. Make a note of any errors found.

Quick Tip

The URL for the iPad simulator is found in the eText authoring environment. Select **Mobile Instructor** or **Mobile Student** from the **Review As** drop-down menu.

Note

In iPad simulator view, hotspots that should be turned off (like Flash hotspots) appear as turned off.

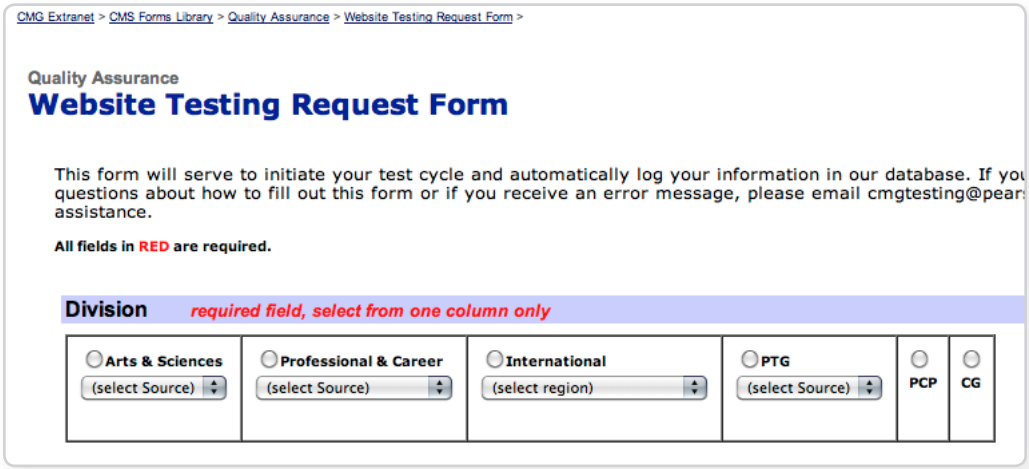
Hotspot QA by Pearson Media QA Services

If the FSV is unable or not approved to perform QA, then Pearson Media QA Services performs hotspot QA. However, the FSV initiates this workflow.

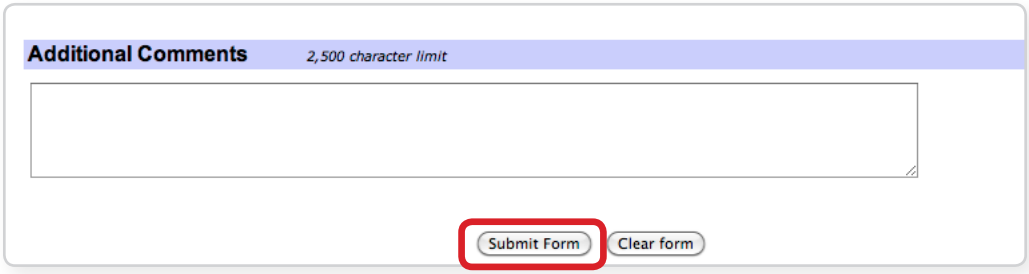
Role

These steps are performed by the **Full Service Vender (FSV)**.

1 Launch your browser, and navigate to Pearson's Website Testing Request Form.


CMG Extranet > CMS Forms Library > Quality Assurance > Website Testing Request Form >
Quality Assurance
Website Testing Request Form
This form will serve to initiate your test cycle and automatically log your information in our database. If you
questions about how to fill out this form or if you receive an error message, please email cmgtesting@pears
assistance.
All fields in RED are required.
Division
required field, select from one column only
Arts & Sciences
(select Source)
Professional & Career
(select Source)
International
(select region)
PTG
(select Source)
PCP
CG

2 Complete the form, and then click the Submit Form button.

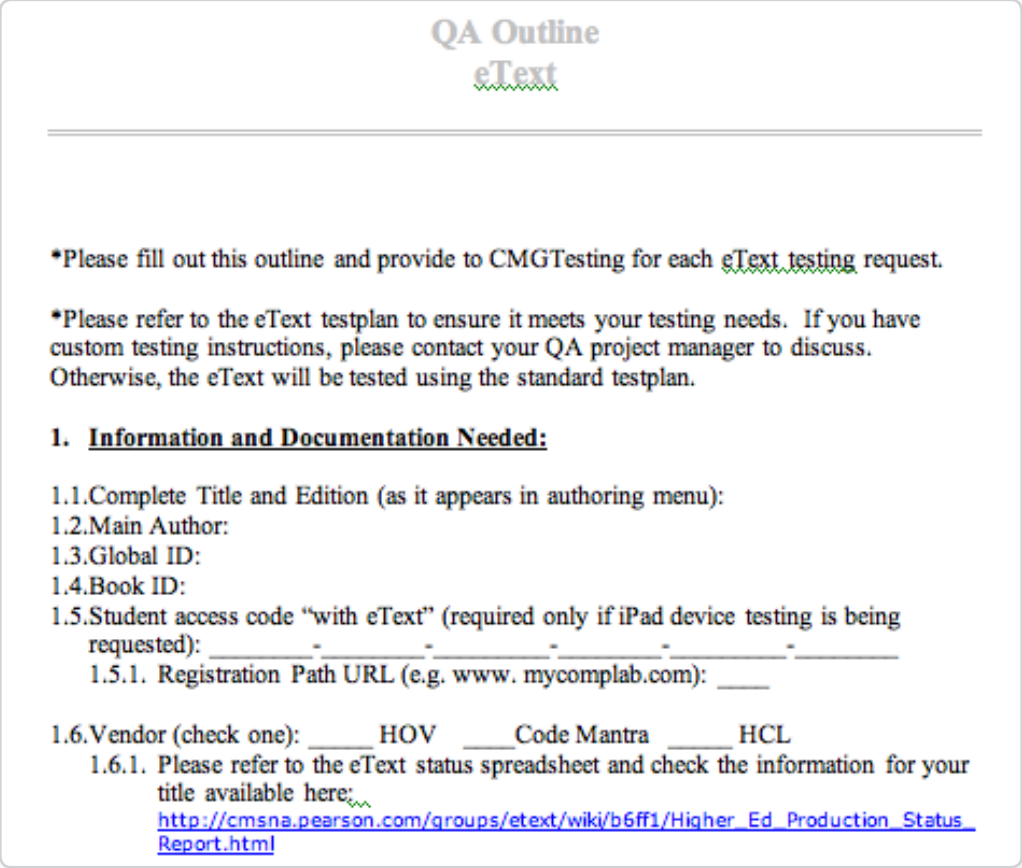


NOTES

- Include the Pearson Project Manager's email address in the **Additional Email Addresses** text box.
- Include the eText review URL in the **Website URL** text box.
- At the **Test Level** drop-down menu, select **Functional**.

4 Two emails from Pearson Media QA Services arrive in your email client inbox: one is an automated response to the test request, and the other contains an attached eText QA Outline questionnaire.

5 Open the blank QA Outline, and then complete and save it with a new file name.



QA Outline
eText

*Please fill out this outline and provide to CMGTesting for each eText testing request.

*Please refer to the eText testplan to ensure it meets your testing needs. If you have custom testing instructions, please contact your QA project manager to discuss. Otherwise, the eText will be tested using the standard testplan.

1. **Information and Documentation Needed:**

1.1.Complete Title and Edition (as it appears in authoring menu):
1.2.Main Author:
1.3.Global ID:
1.4.Book ID:
1.5.Student access code "with eText" (required only if iPad device testing is being requested): _____-_____-_____-_____-_____-_____
1.5.1. Registration Path URL (e.g. www. mycomplab.com): ____

1.6.Vendor (check one): _____ HOV ____Code Mantra _____ HCL
1.6.1. Please refer to the eText status spreadsheet and check the information for your title available here:
http://cmsna.pearson.com/groups/etext/wiki/b6ff1/Higher_Ed_Production_Status_Report.html

NOTE The QA Outline is a required questionnaire that asks for additional information about the eText (Book ID and Global Book ID), specific requirements of the QA test, and the FTP location of low-res printer PDFs and any custom spreadsheets.

Quick Tip

Save the QA Outline template to your computer to have on hand for future reference.

More Info

Download the Ball5e_eText_outline.doc document to view a completed sample eText QA Outline.

6 Reply to the automated email from Pearson Media QA Services and attach the completed eText QA Outline.

7 Upon receipt of the completed QA Outline, Pearson Media QA Services manages the hotspot QA as per the eText testplan, and any additional testing requirements provided in the outline.

Note

The eText testplan is an established plan for standardized QA testing of eText titles. You do not need to reference the plan.

10 | Correct Errors from Hotspot QA

When initial Hotspot QA testing is complete, any errors found are corrected by the FSV. If needed, revisions are provided by the Media contact and communicated by the Pearson Project Manager. The eText is then submitted for regression testing.

Note

Follow the same workflow that was chosen in **9 Perform Hotspot QA**.

Hotspot QA by Full Service Vendor: Corrections

Role

These steps are performed by the **FSV**.

1 When review of errors found during initial QA testing is complete, notify Pearson Project Manager, and provide a list of content errors (i.e., errors with custom hotspots), along with the applicable eText review URLs.

NOTE Content errors with custom hotspots usually pertain to incorrect URLs for the link destination or missing/unclear instructions for hotspot placement.

2 If content errors with custom hotspots were found during the initial QA review:

Role

This step is performed by the **Pearson Project Manager**.

a Give the FSV's list of content errors to the Media contact, along with the applicable eText review URL(s).

b Review the list of content errors, update information on the Custom Hotspot Spreadsheet as needed (replace link URLs or update instructions for link placement), and then provide feedback and/or a revised spreadsheet to the Pearson Project Manager.

Role

This step is performed by the **Media** contact.

c Provide the Media contact's feedback and/or revised Custom Hotspot Spreadsheet to the FSV.

Role

This step is performed by the **Pearson Project Manager**.

d Review the feedback and/or revised Custom Hotspot Spreadsheet, and then log in to the eText Authoring environment to correct custom hotspot errors.

Role

This step is performed by the **FSV**.

NOTE Training on the eText authoring environment is separate from this manual. Refer to the eText Production Manual.

3 If general hotspot errors unrelated to content were found, launch your browser, and then navigate to the eText Authoring environment to correct the errors.

Role

These steps are performed by the **Full Service Vendor (FSV)**.

4 After all corrections are made, initiate QA regression testing with your internal QA team to confirm that all errors found during the initial QA test have been fixed.

5 If QA regression testing shows that some errors are still not fixed, or new errors have been found:

   a Review the errors, and then log in to the eText Authoring environment to make the necessary corrections.

   b After all corrections are made, notify the Pearson Project Manager.

Note

Further regression testing to confirm remaining errors have been fixed is unnecessary.

6 When all final QA corrections are implemented, tell the Media contact that hotspot QA is complete.

Role

This step is performed by the **Pearson Project Manager**.

Hotspot QA by Pearson Media QA Services: Corrections

1 When initial hotspot QA is complete, you receive an email notification from Pearson Media QA Services containing a link to the Bug Report. Log in to Mantis to access the Bug Report.

Role

These steps are performed by the **FSV**.

NOTE Mantis is a web-based bug tracking system. The email from Pearson Media QA Services contains the URL, login credentials, and instructions.

2 Review the Bug Report. If general hotspot errors unrelated to custom hotspot content were found, launch your browser, and then navigate to the eText Authoring environment to correct the errors.

NOTE Training on the eText authoring environment is separate from this manual. Refer to the eText Production Manual.

3 If any content errors related to custom hotspots were found in the Bug Report:

a Email the Pearson Project Manager, and attach a list of content errors found with custom hotspots, along with the applicable eText review URL(s).

Role

This step is performed by the **Pearson Project Manager**.

b Forward the FSV's list of content errors to the Media contact, along with the applicable eText review URL(s).

Role

This step is performed by the **Media** contact.

c Review the list of content errors, update information on the Custom Hotspot Spreadsheet as needed (replace link URLs or revise placement instructions), and then give feedback and/or a revised spreadsheet to Pearson Project Manager.

Role

This step is performed by the **Pearson Project Manager**.

d Give the Media contact's feedback and/or revised Custom Hotspot Spreadsheet to the FSV.

Role

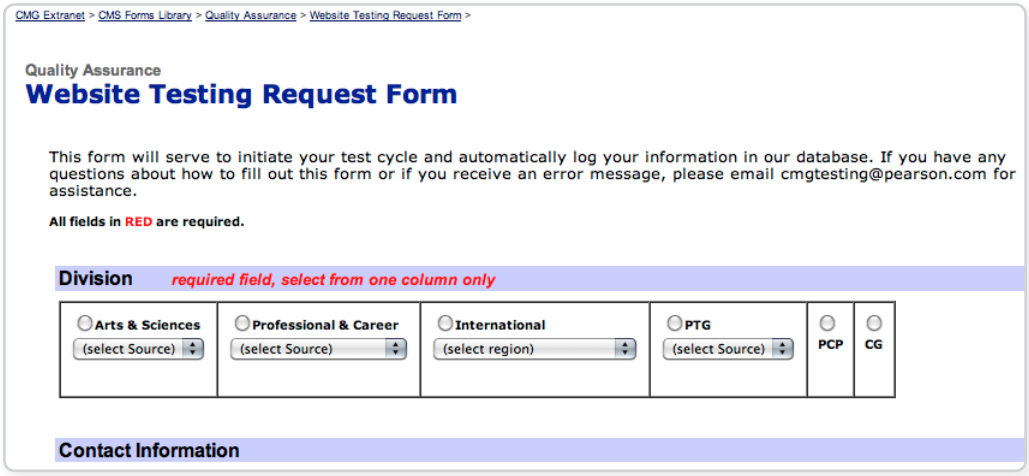
This step is performed by the **FSV**.

e Review the feedback and/or Custom Hotspot Spreadsheet, and then log in to the eText Authoring environment to correct custom hotspot errors.

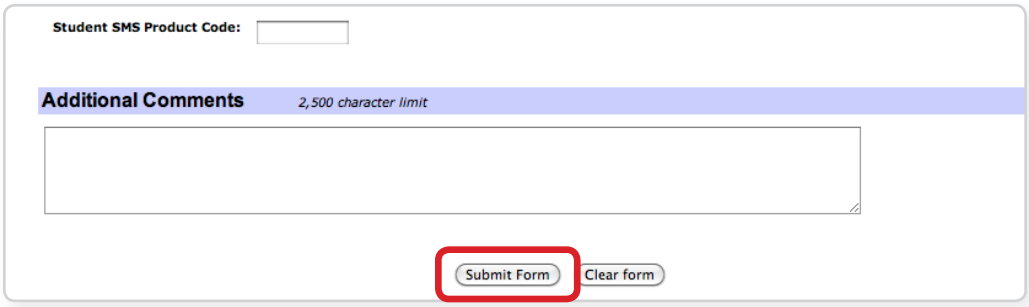
NOTES

- Content errors with custom hotspots usually pertain to incorrect URLs for the link destination, or missing/unclear instructions for hotspot placement.
- Training on the eText authoring environment is separate from this manual. Refer to the eText Production Manual.

4 After all corrections have been made, launch your browser, and then navigate to the **Website Testing Request Form** to initiate regression testing.


CMG Extranet > CMS Forms Library > Quality Assurance > Website Testing Request Form >
Quality Assurance
Website Testing Request Form
This form will serve to initiate your test cycle and automatically log your information in our database. If you have any questions about how to fill out this form or if you receive an error message, please email cmgtesting@pearson.com for assistance.
All fields in RED are required.
Division
required field, select from one column only
Arts & Sciences
(select Source)
Professional & Career
(select Source)
International
(select region)
PTG
(select Source)
PCP
CG
Contact Information

5 Complete the form, and then click the **Submit Form** button.



NOTES

- Include the Pearson Project Manager's email address in the **Additional Email Addresses** text box.
- Include the eText review URL in the **Website URL** text box.
- At the **Test Level** drop-down menu, select **Regression**.

Role

These steps are performed by the **FSV**.

7 An automatic email confirmation from Pearson Media QA Services arrives in your inbox.

8 When regression testing is complete, you will receive an automatic email notification from Pearson Media QA Services. If QA regression testing shows that some errors are still not fixed, or new errors are found:

a Access the Bug Report in Mantis.

b Review the errors, and then log in to the eText Authoring environment to make the necessary corrections.

c After all corrections have been made, notify the Pearson Project Manager.

Note

Further regression testing to confirm that remaining errors are fixed is unnecessary.

9 When all final QA corrections have been implemented, tell the Media contact that the hotspot QA is complete.

Role

This step is performed by the **Pearson Project Manager**.

11 | Begin Final Review

After correcting the initial Hotspot QA errors and implementing regression testing, the Full Service Vendor confirms the accuracy of all custom hotspots that contained errors.

Role

These steps are performed by the **FSV**.

1 Launch your browser, and navigate to the eText review URL.

2 With the eText preview open, refer to the Revised Custom Hotspot spreadsheet. Confirm that all custom hotspot errors found during the Hotspot QA have been corrected. As applicable, for each hotspot that contained an error, confirm that the custom hotspot:

- **a** media icon is accurate.
- **b** is placed in the correct location on the page.
- **c** is functioning correctly.

3 If the eText has an iPad view that contained corrections to custom hotspots, repeat step 2 using the iPad preview.

4 Record any additional errors found.

12 | Begin Final Corrections

If Final Review yields additional content errors, they must be corrected and approved.

1 If errors were found during Final Review, either make the corrections when the errors are obvious. Or if the errors are more involved (for example, hotspot URLs are incorrect), email the list of errors along with the applicable eText review URL(s) to the Pearson Project Manager.

Role

This step is performed by the **FSV**.

2 Forward the list of errors to the Media contact, along with the eText review URL(s).

Role

This step is performed by the **Pearson Project Manager**.

3 Review the list of flagged custom hotspots and update information on the Custom Hotspot spreadsheet, if necessary.

Role

These steps are performed by the **Media** contact.

4 Give the revised Custom Hotspot spreadsheet to the Pearson Project Manager.

5 Forward the revised spreadsheet to the Full Service Vendor.

Role

This step is performed by the **Pearson Project Manager**.

6 Log in to the eText Authoring environment and make final corrections, as per the revised spreadsheet.

Role

These steps are performed by the **FSV**.

NOTES

- This correction process continues until all errors are addressed.
- When all errors are corrected, the eText is considered final.

7 When all errors are corrected, notifiy the Pearson Project Manager that the eText is final.

8 Notifiy the Media contact that the eText is final.

Role

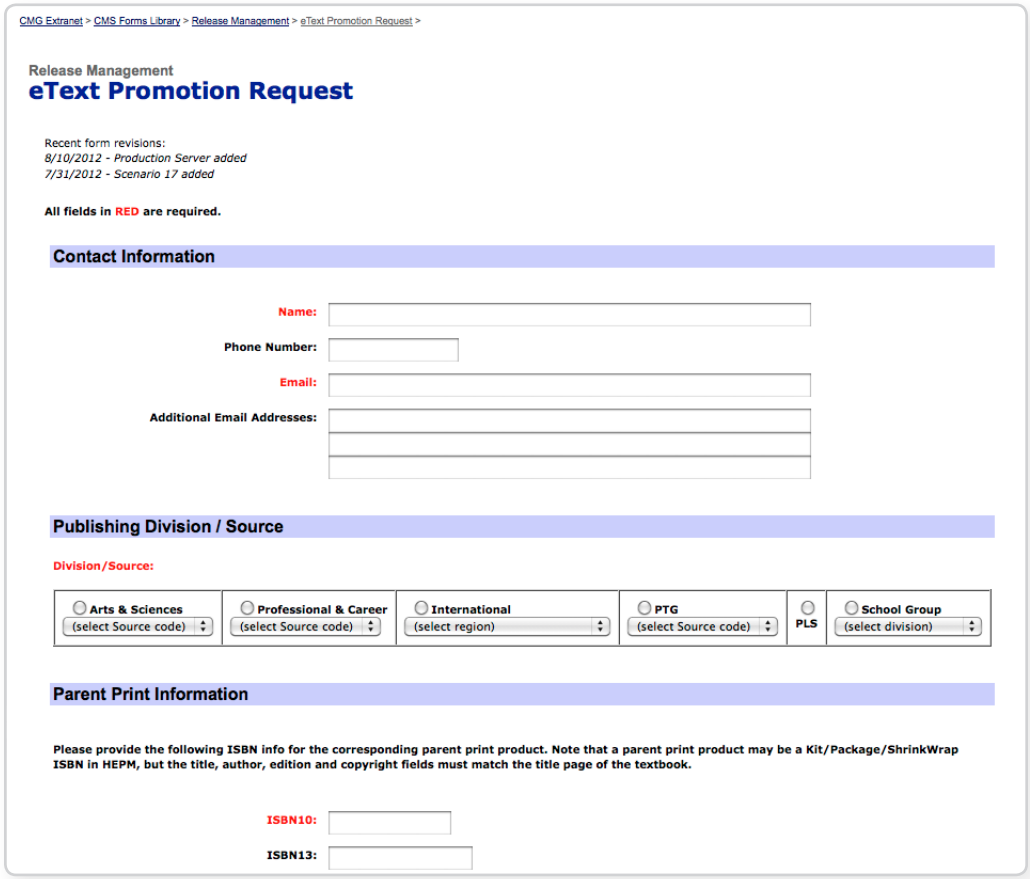
This step is performed by the **Project Manager**.

13 | Release eText

When the eText is considered final, it is published (or republished in the case of early promotion) with all required integration scenarios (including the iPad scenario, if applicable). Its record is then updated in PCS and HEPM.

Publish/Promote eText

1 Launch your browser, and then click the eText Promotion Request Form link.


CMG Extranet > CMS Forms Library > Release Management > eText Promotion Request >

Release Management

eText Promotion Request

Recent form revisions:
8/10/2012 - Production Server added
7/31/2012 - Scenario 17 added

All fields in RED are required.

Contact Information

Name:
Phone Number:
Email:
Additional Email Addresses:

Publishing Division / Source

Division/Source:

Arts & Sciences (select Source code) | Professional & Career (select Source code) | International (select region) | PTG (select Source code) | PLS | School Group (select division)

Parent Print Information

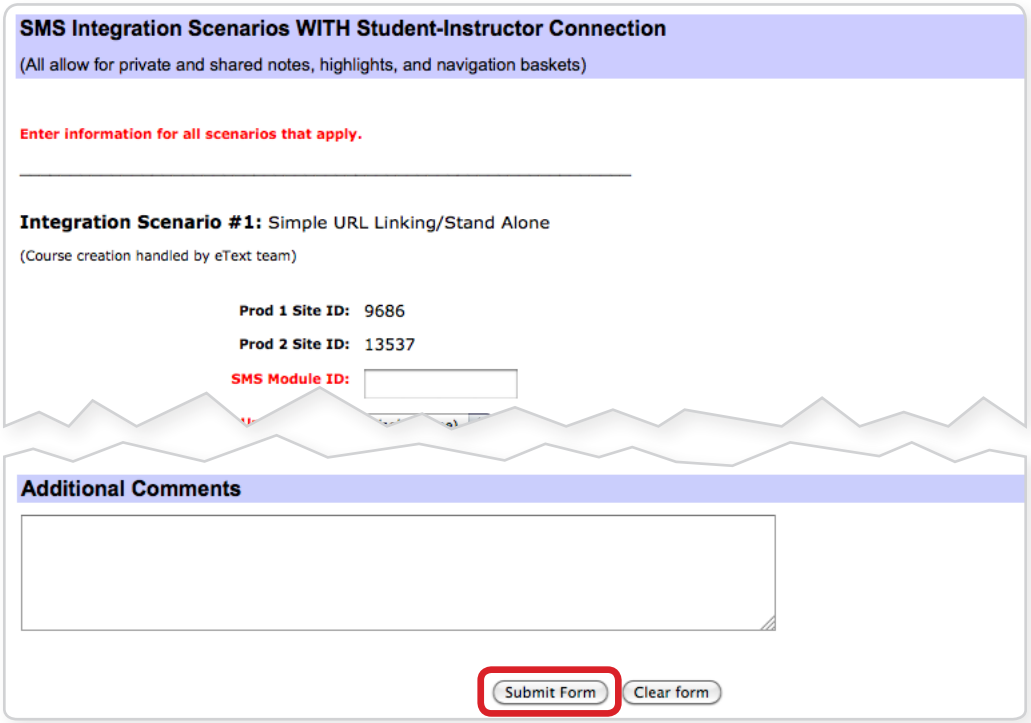
Please provide the following ISBN info for the corresponding parent print product. Note that a parent print product may be a Kit/Package/ShrinkWrap ISBN in HEPM, but the title, author, edition and copyright fields must match the title page of the textbook.

ISBN10:
ISBN13:

Role

These steps are performed by the **Pearson Project Manager**.

2 Complete the form and specify all integration scenarios *including* the iPad scenario, if applicable, and then click the Submit Form button.


SMS Integration Scenarios WITH Student-Instructor Connection
(All allow for private and shared notes, highlights, and navigation baskets)
Enter information for all scenarios that apply.
Integration Scenario #1: Simple URL Linking/Stand Alone
(Course creation handled by eText team)
Prod 1 Site ID: 9686
Prod 2 Site ID: 13537
SMS Module ID:
Additional Comments
Submit Form
Clear form

3 When the eText is published, you receive an email notification from Pearson's Website Release team. Upon receipt of this email, notify all other Pearson project team members that the eText has been published/republished.

More Info

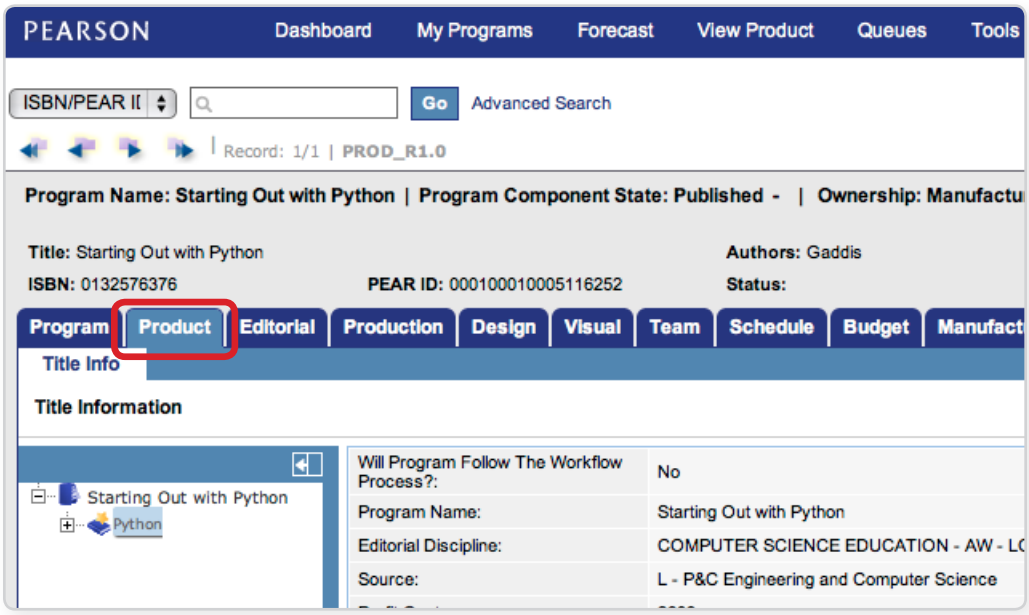
SMS Module IDs and other details required in the form can be found in the completed **eText Launch Checklist**.

Note

After you submit the form, data is automatically passed on to Pearson's Website Release team.

Update PCS Record

1 Log in to PCS, locate your program, and then click the **Product** tab.



Role

These steps are performed by the **Pearson Project Manager**.

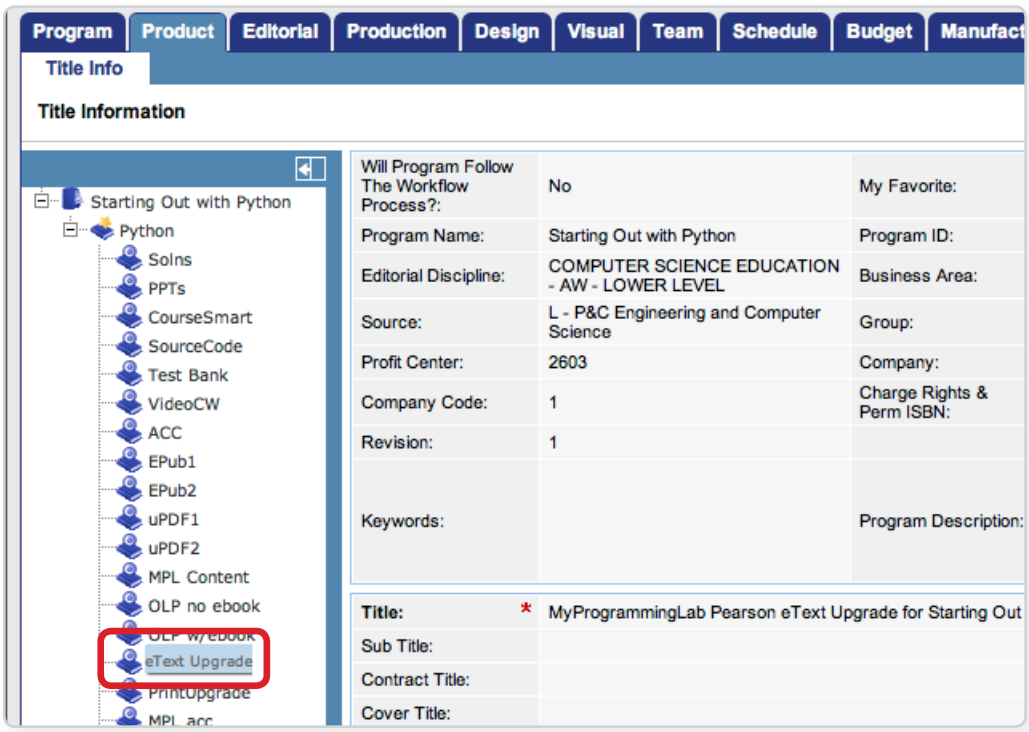
Note

To log in to PCS, go to: http://pcs.pearson.com/pims.

Quick Tip

To access a program, click **My Programs** or run a search.

2 Expand the program tree, and then click the **eText Upgrade** component.



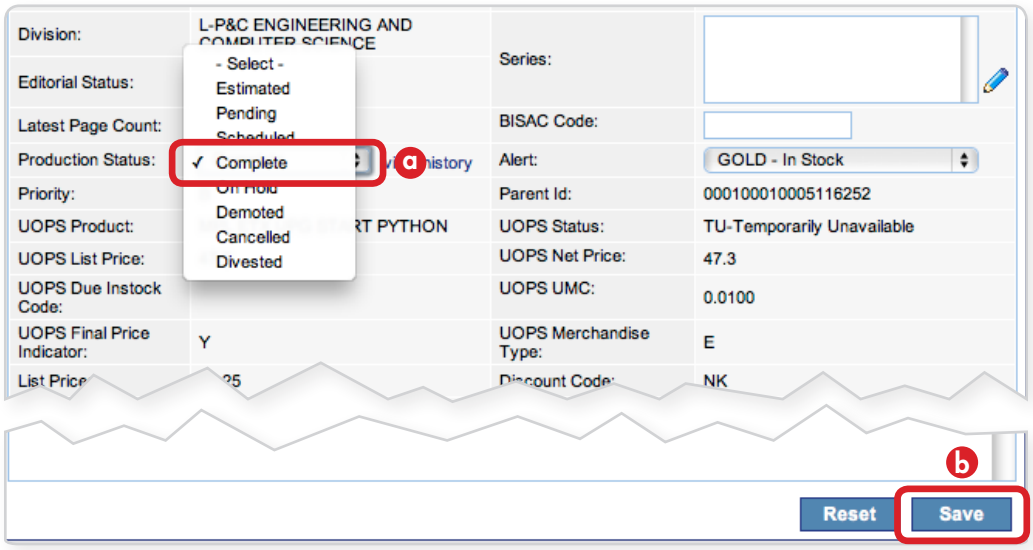
Quick Tip

Click the ⊞ icon to expand the program tree.

3 Scroll down the screen.

a Click the **Production Status** drop-down menu, and then select **Complete**.

b Click the **Save** button to save your changes.



NOTE Depending on your business unit, you may also be required to select **GOLD - In Stock** from the **Alert** drop-down menu.

Change UOPS Status to AS

1 Contact the appropriate Inventory Manager, Title Maintenance contact, or other responsible party, and request the eText ISBN(s) be changed to AS/instock in HEPM.

Role

This step is performed by the **Pearson Project Manager**.

14 | Close eText Project

The final step of the eText production process is to submit all eText files to be archived in Documentum.

1 Provide updated, final versions of all custom spreadsheets, along with source files for any original custom media icon artwork, to the Pearson Project Manager.

Role

This step is performed by the **FSV**.

2 Submit all files, provided by the Full Service Vendor, to be archived in Documentum under the eText Upgrade ISBN. Refer to the **Asset Management Services** website for submission guidelines.

Role

This step is performed by the **Pearson Project Manager**.

15 | Appendix: eText Resources

RESOURCE	LOCATION	NOTE
Content Management Services eText Neo Group	https://neo.pearson.com/groups/etext	Pearson staff only
eText Art Asset Guidelines	http://media.pearsoncmg.com/cmg/intranet/ebookplus/eText_Art_Asset_guidelines.pdf	
eText File Conversion Request Form	http://etextdb.pearsoncmg.com/etextdb/eTextConversionRequestHE	
eText File Submission Guidelines	http://media.pearsoncmg.com/cmg/intranet/ebookplus/eText_File_Submission_Guidelines.pdf	
eText Integration Scenarios	https://neo.pearson.com/docs/DOC-66221	Pearson staff only
eText Interface Quick Reference Guide	http://contentmanagement.pearson.com/etext/QRGs/eText_Interface_QRG.pdf	
eText Launch Checklist	http://contentmanagement.pearson.com/etext/QRGs/eText_Launch_Checklist.pdf	
eText Launch Checklist Guide	http://contentmanagement.pearson.com/etext/QRGs/eText_Launch_Checklist_QRG.pdf	
eText Support Requests	eBookPlusProduction@Pearson.com	
eText Promotion Request Form	http://wpslive.pearsoncmg.com/cmg_forms_library/116/29779/7623431.cw/index.html	
eText Videos	http://contentmanagement.pearson.com/training/eText/eText_Video_Introduction.html http://contentmanagement.pearson.com/training/eText/eText_Video_Search.html http://contentmanagement.pearson.com/training/eText/eText_Video_Whiteboard.html	

RESOURCE	LOCATION	NOTE
Pearson Higher Ed: eBook Full Service Vendor Project Management Neo Group	https://neo.pearson.com/groups/pearson-higher-education-ebook-full-service-vendor-project-management	
Pearson Knowledge Base	http://kb.pearsoned.com/	
Pearson Systems & Application Access (for onboarding new users)	http://contentmanagement.pearson.com/documentum/pdf/CMS%20User%20OnBoarding%202012.pdf	
SMS Project Workplace	https://sms.pearsoncmg.com/workplace/	
USHE Standard Media Design Program	http://usheproduction.pearsoned.com/media/media_design/index.cfm	
Website Testing Request Form	http://wpslive.pearsoncmg.com/cmg_forms_library/0,,1892799-,00.html	